



Monica J. Lindeen

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**REFUND OF SURPLUS LINES TAXES AND FEES
FORM W-9**

All refunds issued by the Office Commissioner of Securities and Insurance, Montana State Auditor must have a completed form W-9 with a year-end surplus lines tax statement that supports the refund. The W-9 form must be completed annually by either an agency (which may be used for more than one agent) or for each individual agent.

Please contact Tasha Bird at 406-444-1867 or nbird@mt.gov if you have any questions on the completion of the W-9 form or Tim Morris at 406-444-4489 or tmorris@mt.gov if you have any questions on your surplus lines tax statement.

CSI link for a W-9 form:

<http://www.csi.mt.gov/Central%20Services/W9%20form.pdf>